COMMITTEE ON ENERGY AND COMMERCE CHAIRMAN



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http://upton.house.gov

Congress of the United States House of Representatives

July 28, 2015

The Honorable Charles W. Dent Committee on Ethics 1015 Longworth Washington, DC 20515-6601

Chairman Dent,

I would note that I have provided the combined income by category for the trusts managed by Northern Trust and J.P. Morgan Chase, and not by individual listing. As I indicated, these trusts are managed by these institutions and I have no authority or decision making authority. Though I am informed of the value of each of the assets within the trusts, neither institution has itemized the amount of income for the separate 140-plus entities, except for the K-1s for each trust which complies with my IRS tax submittal. I have asked that they inform me of securities that are bought and sold within each trust, and I will submit such when it is given to me within the 30-day window. I have already heard that N. Trust has not made any transactions in 2015.

Thank you for your understanding. If you have any questions, I can be reached at (202)225-3761.

Sincerely,

Member of Congress

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B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the A. Did you, your spouse, or your dependent child: **EXEMPTION** – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all **TRUSTS** – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. this report details of such a trust that benefits you, your spouse, or your dependent child? IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance. exceeding \$1,000 during the reporting period? PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS **UNITED STATES HOUSE OF REPRESENTATIVES** three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER <u>EACH</u> OF THESE QUESTIONS reporting period? Name: 2014 FINANCIAL DISCLOSURE STATEMENT REPORT TYPE FILER STATUS Make more than \$200 in unearned income from any reportable a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? or asset during the reporting period? Member of or Candidate for U.S. House of Representatives 2014 Annual (Due: May 15, 2015) District: State: ž X Yes Yes Yes X Yes X \overline{X} Daytime Telephone: 202/225-376/ Amendment 공 S O Z <u>z</u> Ş For Use by Members, Officers, and Employees X G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$375 in value from a single source during the reporting period? F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? H. Did you, your spouse, or your dependent child receive any ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES" Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the \$375 in value from a single source during the reporting period? reportable travel or reimbursements for travel totaling more than Form A Employee Officer or Employing Office: Termination Date of Termination: Have you excluded from TIMES STRUCTED BALLY TS. 5.1 2615 JUL 28 PM 4: 44 HAND DELIVERED age 1 of 49 TOUCH OF RECYCLOSING THEES (Office Use Only) Yes Yes Yes Ύes Yes Yes ΎθS X 중 Š Š 몽 몽 Š S X

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	1													Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	ne e
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						•							†	Over \$5,000,000 ×	
														Spouse/DC Asset with income over \$1,000,000*	
														P. S. S(part), or E	Transaction

SCHEDULE B – TRANSACTIONS

													Combinat TN 8/0		cumbuland IN B/a	SP Example Mega Corp. Stock	SP, DC, JT Asset	Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A. * Column K is for assets solety held by your spouse or dependent child.	dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.	Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your	
													V R		? 26			Purchase		VI	
													do		dee			Sale		Type of Transaction	
													med		med	×		Partial Sale		ansactio	
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																×		Check Box if Ca Exceeded \$200	apital Gain		
												, ,	1/15/14	, ,	HISILE	3/5/14		weekly, if applicable	(MO/DAYR) or Quarterly,	Date	
																		\$1,001- \$15,000	>		/
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-	 							 		<u> </u>	 						 	Over \$50,000,0		1	
																		Over \$1,000,00 (Spouse/DC As			

SCHEDULE D - LIABILITIES

Name: Uotax Pa	Page 8 of 19
porting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting erty including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you	amount owed during the reporting your personal residence (unless you

you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. period. Members: Members are required to report all liabilities secured by real prop Report liabilities of over \$10,000 owed to any one creditor at any time during the re *Column K is for liabilities held solely by your spouse or dependent child. rent it out or are a Member); loans secured by automobiles, household furniture, or app

	14	27		sp. Dc, л		
Smp.	J.P.	7.8	Example			
iring Trest	Moreu Chase	Mora Chose	First Bank of Wilmington, DE	Creditor		
4//2	10/10	0//0	5/98	Date Liability Incurred MO/YR		
Promisony Note	Home mor tyes	Home equity line of cal	Mortgage on Rental Property, Dover, DE	Type of Liability		
	•	12		\$10,001- \$15,000	>	
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				\$1,000,001- \$5,000,000	6	bility
				\$5,000,001- \$25,000,000	=	
				\$25,000,001- \$50,000,000		
				Over \$50,000,000	٠	
				Over \$1,000,000* (Spouse/DC Liability)	~	

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude**: Positions JAMMO neld in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **Position** Name of Organization Jen Trust

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	Page 19 of 19

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$375 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

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						ion Societ & Fraklin cta	(March 10 8 11 Derson 1)	enium Entropolic Indi	Habitat for Humanity (charity fundraisser)	Government of China (MECEA)	Source
		9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9			•	Nov 6-11		Moral 6-11	Mar. 3-4	Aug. 6-11	Date(s)
		9 9 9 9 9 9				De-7 Pome -> De		DC-75 51. 64-20	DC-Boston-DC	DC-Beijing, China - DC	City of Departure – Destination — City of Return
					•	Y	,	Y	Υ	γ	Lodging? (Y/N)
					•	Y	•	Y	۲	۲	Food? (Y/N)
						Y	•	Y	۲	N	Family Member Included? (Y/N)